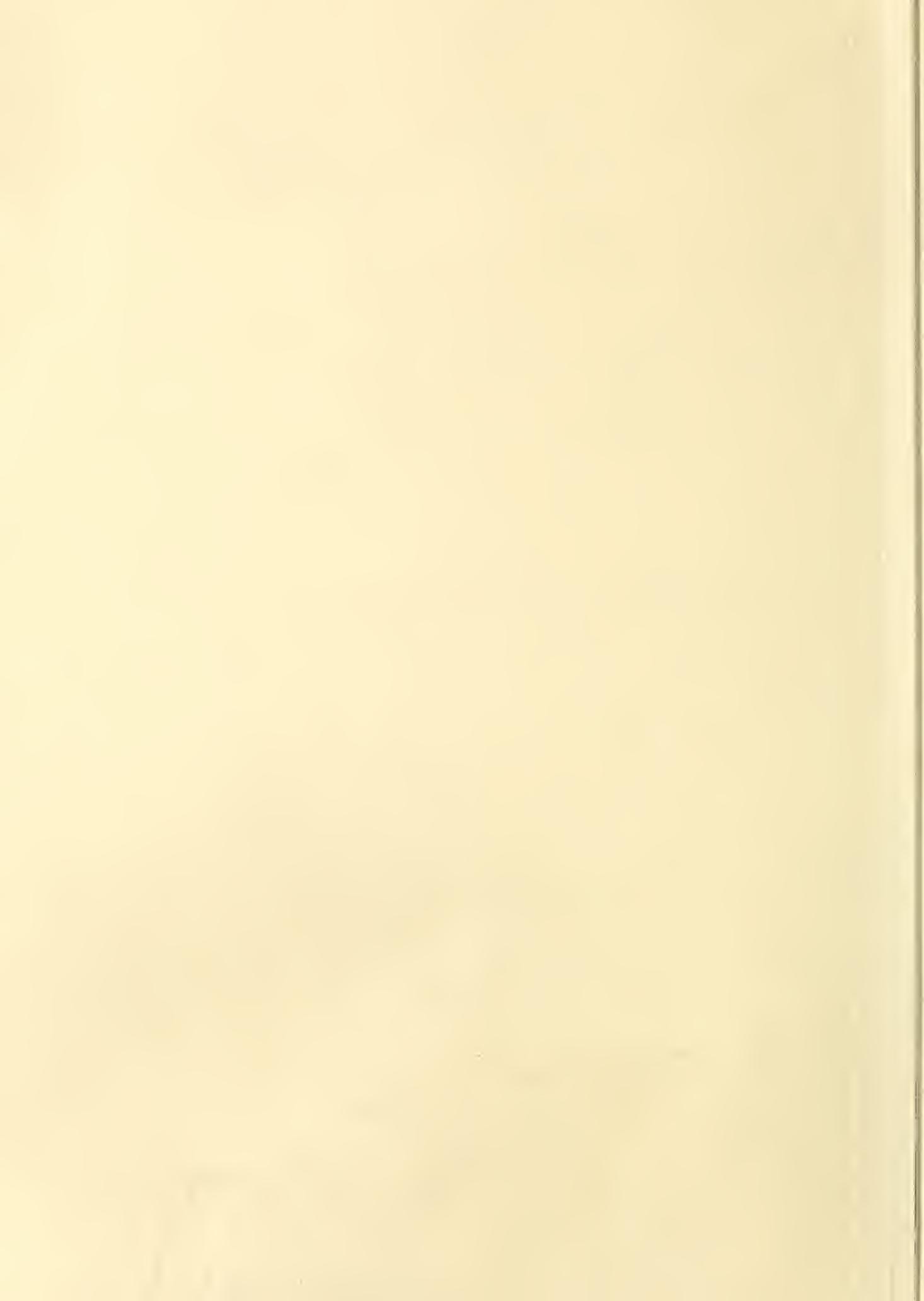


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## QUARTERLY FLAX MARKET REVIEW

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## UNITED STATES FLAXSEED CRUSHINGS LARGEST IN TWELVE YEARS

AUG 23 1944 \*

Reflecting expansion of industrial activity and increased demand for linseed oil, flaxseed crushings in the United States during the October-December quarter were the largest for any corresponding period since the 1928-29 season and totaled 10,083,000 bushels, according to the Federal-State Market News Service. This compares with 8,736,000 bushels during the same months last season and an average of 6,949,000 bushels for the five-year period, 1934-35 to 1938-39. Crushings so far this season (July through December) totaled 17,026,000 bushels against 15,550,000 bushels during the first half of the 1939-40 season and 12,521,000 bushels the previous five-year average.

The bulk of U. S. crushings for the season to date apparently represented domestic flaxseed. Imports increased slightly during the second quarter but brought the total since July 1st up to only 3,878,000 bushels compared with 5,265,000 bushels July through December last season and 8,381,000 bushels the average for the previous five-year period. The smaller imports this season largely reflected the sharp increase in domestic supplies which obviated need for usual purchases of foreign seed.

Despite the increased crushings and falling off in imports, January 1st commercial supplies were almost double the relatively large stocks at the corresponding date last year. Commercial supplies at the beginning of the season apparently were the largest in sixteen years and amounted to 33,138,000 bushels. Adding imports of 3,878,000 bushels and deducting crushings of 17,026,000 bushels July through December points to January 1st stocks of 19,990,000 bushels. This compares with 10,265,000 bushels at the corresponding date last year and 4,723,000 bushels two years back.

Distribution of linseed oil was well maintained during the second quarter and amounted to 153,509,000 pounds. This brought the total for the season since July 1st up to 306,645,000 pounds against 288,287,000 pounds during the corresponding six months last season and 241,674,000 pounds two years back.

TABLE 1. FLAXSEED: SUPPLY AND DISTRIBUTION, UNITED STATES

	5-Year Average 1926-27	5-Year Average 1931-32	1937-38	1938-39	1939-40	Preliminary 1940-41
Factory stocks, July 1	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
Market stocks, July 1	3,033	1,279	2,484	1,472	1,958	3,148
Farm stocks, July 1	879	731	630	552	285	665
Total carry-over, July 1	4,911	2,436	3,339	2,199	2,296	3,911
United States production	20,084	10,070	7,089	8,152	20,152	31,127
Total supply	24,639	12,506	10,428	10,351	22,448	35,038
Seed requirements	1,787	1,186	588	1,360	1,893	1,900
Domestic commercial supply	22,852	11,320	9,840	8,991	20,550	33,128
Imports, July-September	3,269	3,712	5,325	3,561	3,086	1,312
Supply for quarter	26,121	15,032	15,165	12,552	23,636	34,450
Crushings, July-September	8,472	5,543	7,666	5,043	6,814	6,943
Supplies remaining, October 1	17,649	9,489	7,499	7,509	16,822	27,507
Imports, October-December	4,292	3,453	5,153	4,420	2,179	2,566
Supply for quarter	21,941	12,942	12,652	11,929	19,001	30,073
Crushings, October-December	10,463	6,344	7,754	7,206	8,736	10,083
Supplies remaining, January 1	11,478	6,598	4,898	4,723	10,265	19,990
Imports, January-March	5,127	3,403	4,719	6,391	4,793	
Supply for quarter	16,605	10,001	9,617	11,114	15,058	
Crushings, January-March	9,659	5,552	6,461	7,112	7,892	
Supply remaining, April 1	6,946	4,449	3,156	4,002	7,166	
Imports, April-June	5,971	3,169	2,664	4,372	3,154	
Supply for quarter	12,917	7,618	5,820	8,374	10,320	
Crushings, April-June	8,602	4,828	3,969	6,207	6,637	
Supplies remaining, or unaccounted for, June 30	4,315	2,790	1,831	2,167	3,683	
Split-up stocks, June 30:						
Factory and warehouse	2,731	1,484	1,472	1,958	3,148	
In terminal markets	779	719	552	285	665	
On farms	599	402	175	53	98	
Unaccounted for	206	185	368	129	228	

Compiled from official data of the Agricultural Marketing Service and the United States Department of Commerce.

1/ Preliminary.

(Over)

TABLE 2, LINSEED OIL: SUPPLY AND DISTRIBUTION, UNITED STATES

	5-Year Average 1931-32 1935-36	1936-37	1937-38	1938-39	1939-40	1940-41
Factory and warehouse stocks, July 1	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Production, July-September	102,998	140,754	142,462	145,932	130,250	132,881
Imports, July-September	104,965	91,805	151,278	98,407	134,326	135,389
Total supply for quarter	1,201	170	53	16	12	1
Exports, July-September	209,164	232,729	293,793	244,355	264,583	268,271
Factory consumption, July-September	240	353	256	395	418	1,119
Other domestic disappearance	65,627	79,702	93,627	80,702	88,308	101,652
Total disappearance, July-September	39,237	53,023	57,005	50,212	63,233	50,365
Factory and warehouse stocks, Oct. 1	105,104	133,078	150,888	131,309	151,959	153,136
Production, October-December	104,060	99,651	142,905	113,046	112,629	115,135
Imports, October-December	120,446	131,899	150,432	139,106	166,150	192,185
Total supply for quarter	1,085	32	98	16	6	9
Exports, October-December	225,591	231,582	293,435	252,168	278,785	307,329
Factory consumption, October-December	217	195	183	113	1,841	1,359
Other domestic disappearance	57,497	78,102	67,411	72,332	88,287	100,837
Total disappearance, Oct.-December	29,030	35,985	34,358	37,920	46,200	51,313
Factory and warehouse stocks, Jan. 1	86,744	114,282	101,952	110,365	136,328	153,509
Production, January-March	138,847	117,300	191,483	141,803	142,457	153,820
Imports, January-March	104,158	156,877	125,587	139,209	150,197	
Total supply for quarter	242	51	50	12		
Exports, January-March	243,247	274,228	317,120	281,024	292,654	
Factory consumption, January-March	229	278	162	172	1,180	
Other domestic disappearance	57,112	95,809	63,353	76,511	85,526	
Total disappearance, January-March	29,732	40,058	30,481	42,954	33,143	
Factory and warehouse stocks, April 1	87,123	136,145	94,001	119,637	119,854	
Production, April-June	156,124	138,083	223,119	161,387	172,800	
Imports, April-June	92,284	206,512	77,513	124,323	128,383	
Total supply for quarter	466	200	41	19	1	
Exports, April-June	248,874	344,795	300,673	286,229	301,184	
Factory consumption, April-June	147	270	220	135	1,112	
Other domestic disappearance	77,090	118,373	82,089	91,869	98,977	
Total disappearance, April-June 30	56,129	83,690	72,432	63,975	68,214	
Factory and warehouse stocks, June 30	133,366	202,333	154,741	155,979	168,303	
	115,508	142,462	145,932	130,250	132,881	

FRANK L. LYONS

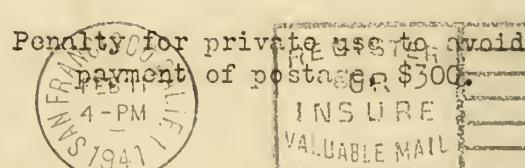
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